Sage CRM
Add-on Catalog

INSIDE: Exciting add-ons to enhance your Sage CRM system

YOUR SUCCESS IS IMPORTANT TO US

Last year, Azamba celebrated it's 10th year in business, and personally, I have been helping companies like yours reach their goals through the use of Sage CRM for nearly 20 years. The time has flown by!

As my team and I sat down and reflected on the hundreds of customers we have helped, we realized that our top-performing customers have taken advantage of the powerful customization capabilities baked into Sage CRM. Those customers have shaped, tweaked, and extended the core product to enable themselves to create streamlined, specialized processes and screens that help them reach their business goals and deliver consistent, high-quality experiences to their customers and prospects.

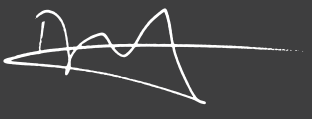
As part of our quest to help you be more successful, we asked ourselves how we can help more customers reach the same level of value from Sage CRM quickly and affordably. You are holding the result of those discussions in your hands.

Inside these pages, you will find a wide variety of useful add-ons and extensions to Sage CRM that we hope will resonate with your needs and help you take your Sage CRM investment to a new level. These are some of our best and most asked for customizations, and we are now delivering them all for affordable monthly subscriptions.

And, if you are a Premium or Preferred subscriber to our OnTrack CRM Success Plan, every one of these add-ons is available at no charge. Yep ... FREE!

We're not stopping here. We have committed to expanding and improving the current offerings in the coming months and years. If you have an idea for an add-on, let us know – we would love to hear from you and add it to our growing list.

I look forward to hearing from you. Enjoy flipping through the catalog!



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ABOUT OUR ADD-ONS

SAGE CRM AND SAGE 100 VERSION NEUTRAL

No matter which version of Sage CRM or Sage 100 you have, our add-ons are guaranteed to work. Add-on functionality is also not affected by installing upgrades or service packs.

ENHANCE STANDARD INTEGRATION

Many of our add-ons are designed to improve upon existing Sage CRM integration features to better meet your needs.

DESIGNED FOR YOU

We consistently update our add-ons to make them better for you, and if our add-on doesn't do everything you need, talk to us, and we can customize it to better suit your business.

BUILT IN-HOUSE

Our dedicated staff are also Sage CRM users, which means they know how to build upon the best features and capabilities of your Sage CRM system.

QUOTA MANAGER

ENTER AND TRACK YOUR TEAM'S SALES QUOTAS EASILY AND EFFECTIVELY

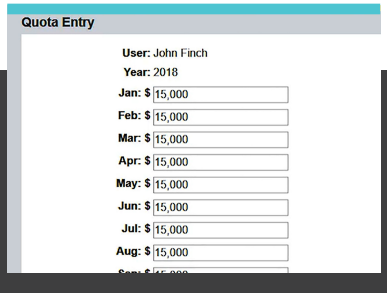
STOP MANAGING SALES QUOTAS IN EXCEL AND START MANAGING QUOTAS IN SAGE CRM

Enter, edit, and view sales quotas and progress quickly and easily right inside Sage CRM.

TAKE THE GUESSWORK OUT OF YOUR TEAM'S QUOTAS AND SALES PROGRESS

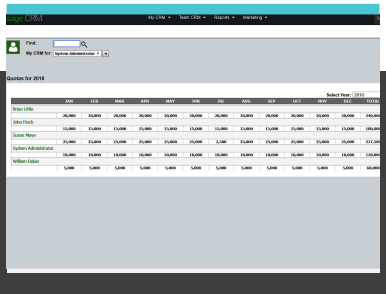
Create quotas for both individual sales team members and entire sales teams.

ENTER QUOTA AMOUNTS



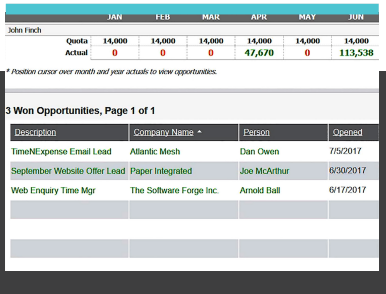
Enter monthly sales quotas for each of your team members from the new Quotas tab.

VIEW USERS' QUOTAS

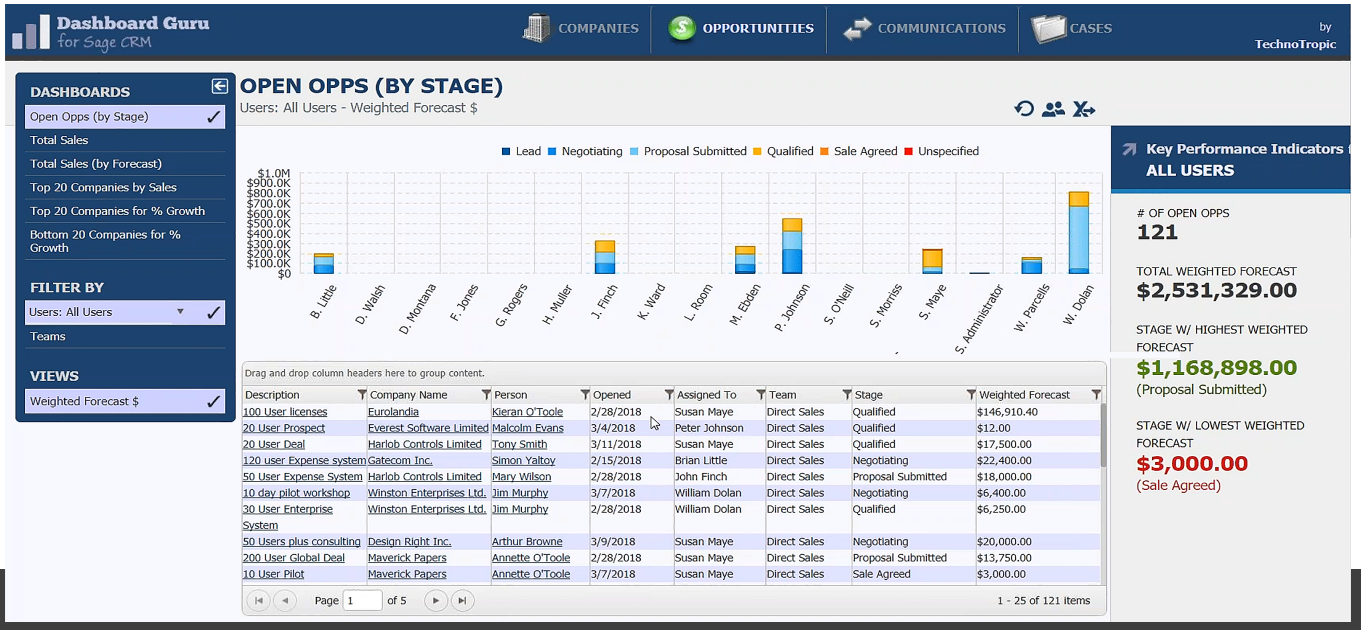


Display quotas by month and by year in an intuitive and interactive table.

CHECK QUOTA PROGRESS



Drill down to individual sales over a given time period for each salesperson.



DASHBOARD GURU

VIEW, UNDERSTAND, ANALYZE, AND LEARN FROM YOUR DATA LIKE NEVER BEFORE

Do you need a way to filter, visualize, extract, and make sense of all the information in your CRM? To transform your data from a collection of information sitting in CRM, to a valuable asset that will deliver real value to your business? Finally do all this within Sage CRM without paying your IT department or consultant.

- Identify and understand issues, trends, and opportunities, and always know what your teams are doing.
- See unique insights into your companies, opportunities, communications, and cases with multiple specialized dashboards.
- Filter your data and information in multiple ways and change parameters as needed.
- Create better marketing lists based on the smarter data you can only get from Dashboard Guru.

DASHBOARD GURU FEATURES

AGGREGATE DATA IN ONE PLACE

View dashboards, filtered data, report information, and marketing functionality all from one simple, easy-to-use interface.

USE MORE THAN YOUR CRM DATA

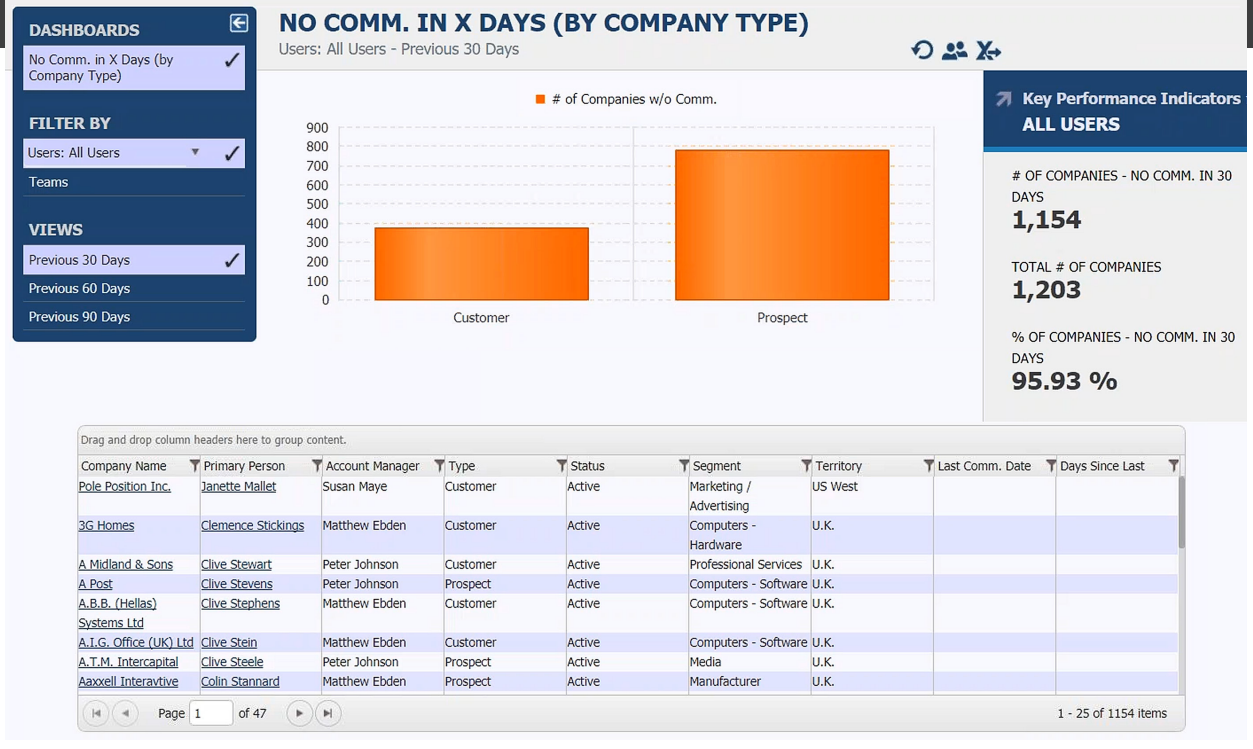
View information pulled from your company databases to create high-value dashboards that give you insight into what is going on across your company.

EXPORT TO EXCEL

Access the detailed data that drives the dashboards you use. Within seconds, you can export data to Excel, where you can slice and dice it any way you like. Import your data back to Sage CRM with just one click.

CREATE SAGE CRM GROUPS

Create call lists, email lists, and marketing groups using Dashboard Guru, and set yourself up for whatever you need to do next.



AUTOMATION TOOLBOX

PROVIDE YOUR SALESPEOPLE WITH AUTOMATIC REMINDERS AND LAST CONTACT DATES

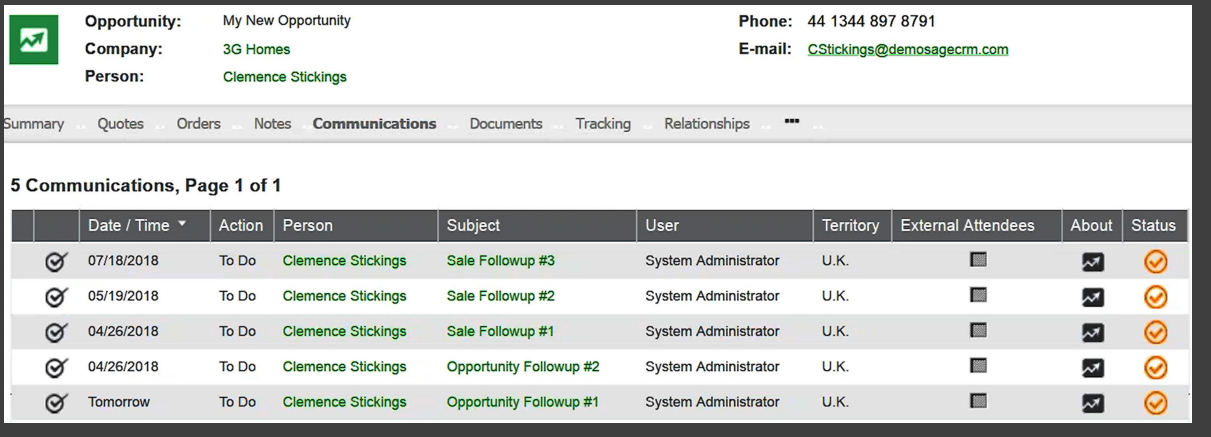
If you aren't using Sage CRM to automate any of your business processes, you aren't maximizing the value of your CRM investment.

The Automation Toolbox automates repetitive but important tasks that might otherwise fall through the cracks.

Show your customers and prospects you are consistent and dependable by making sure simple tasks always get done.

OPPORTUNITY NOTIFICATIONS

Eliminate the need to set notifications manually. Automate follow-up notifications throughout your sales process to ensure quality service and customer satisfaction. Choose the timing and number of notifications to fit your needs.



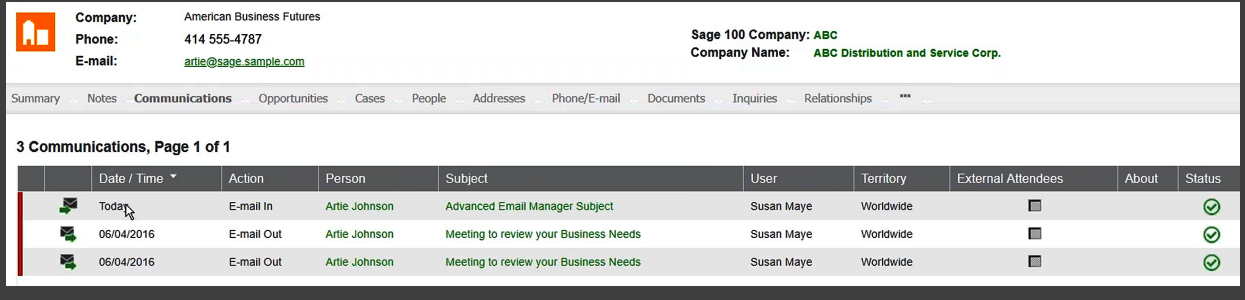
AUTOMATION TOOLBOX FEATURES

LAST COMMUNICATION DATE TRACKER

- Know when to reach out to prospects and customers who haven't been contacted recently.
- See the last date and time you connected with a customer or prospect, displayed on their Sage CRM company summary screen.

ADVANCED MAIL MANAGER

Automatically file emails in Sage CRM and add them to process queues as cases, leads, opportunities, or existing companies.



WORK ON THE ROAD

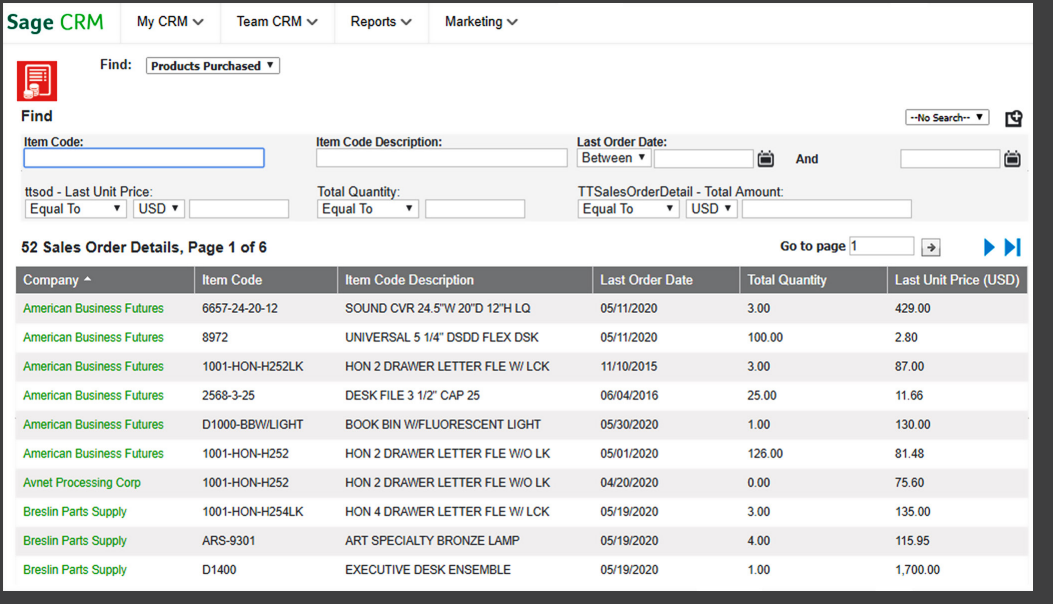
Files emails to CRM or creates records via email even if you don't have access to the Sage CRM phone app or CRM on the web.

INTEGRATE WITH EXCHANGE

Users don't need to install Outlook plug-ins that require software compatibility between versions of Microsoft Office and Sage CRM.

ERP TOOLBOX

DISPLAY YOUR EXISTING SAGE 100 ORDER AND INVENTORY DATA WITHIN SAGE CRM



Company	Item Code	Item Code Description	Last Order Date	Total Quantity	Last Unit Price (USD)
American Business Futures	6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H LQ	05/11/2020	3.00	429.00
American Business Futures	8972	UNIVERSAL 5 1/4" DSDD FLEX DSK	05/11/2020	100.00	2.80
American Business Futures	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/ LCK	11/10/2015	3.00	87.00
American Business Futures	2568-3-25	DESK FILE 3 1/2" CAP 25	06/04/2016	25.00	11.66
American Business Futures	D1000-BBW/LIGHT	BOOK BIN W/FLUORESCENT LIGHT	05/30/2020	1.00	130.00
American Business Futures	1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	05/01/2020	126.00	81.48
Avnet Processing Corp	1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	04/20/2020	0.00	75.60
Breslin Parts Supply	1001-HON-H254LK	HON 4 DRAWER LETTER FLE W/ LCK	05/19/2020	3.00	135.00
Breslin Parts Supply	ARS-9301	ART SPECIALTY BRONZE LAMP	05/19/2020	4.00	115.95
Breslin Parts Supply	D1400	EXECUTIVE DESK ENSEMBLE	05/19/2020	1.00	1,700.00

Understand sales trends, boost sales, and improve sales visibility for your team with the Azamba ERP Toolbox. Your sales team can identify top products and customer purchase patterns to time their sales calls optimally, create more upsell opportunities, and recommend new products and services to existing customers, all within the Sage CRM user interface.

CUSTOMIZE DASHBOARDS AND REPORTS

Give your sales team familiar but powerful tools to make the most of your accounting data. Your team can build custom dashboards for accounting data the same way they already do for sales data.

VIEW ACCOUTING DATA WITHIN SAGE CRM

Give your sales team easy access to search, view, sort, and run reports on accounting data directly within their CRM records and screens. Your team can add that data right into their dashboards.

ERP TOOLBOX FEATURES

BE MOBILE READY

View order and inventory data from the mobile version of Sage CRM.

MONITOR AND ANALYZE ORDERS

Track full sales orders using the Sales Order Search Screen or tab.

TRACK PRODUCTS BY CUSTOMER

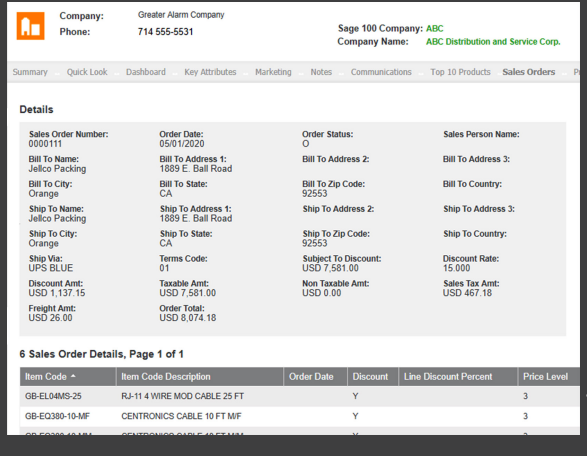
Know which customers have bought which product or service from the new Product Search Screen.

DISPLAY PRODUCT HISTORY

See every product ever purchased by each customer. Filterable by item and date range.

VIEW TOP TEN PRODUCTS

Learn where each customer spends. Top products for each customer are listed by dollar amount.

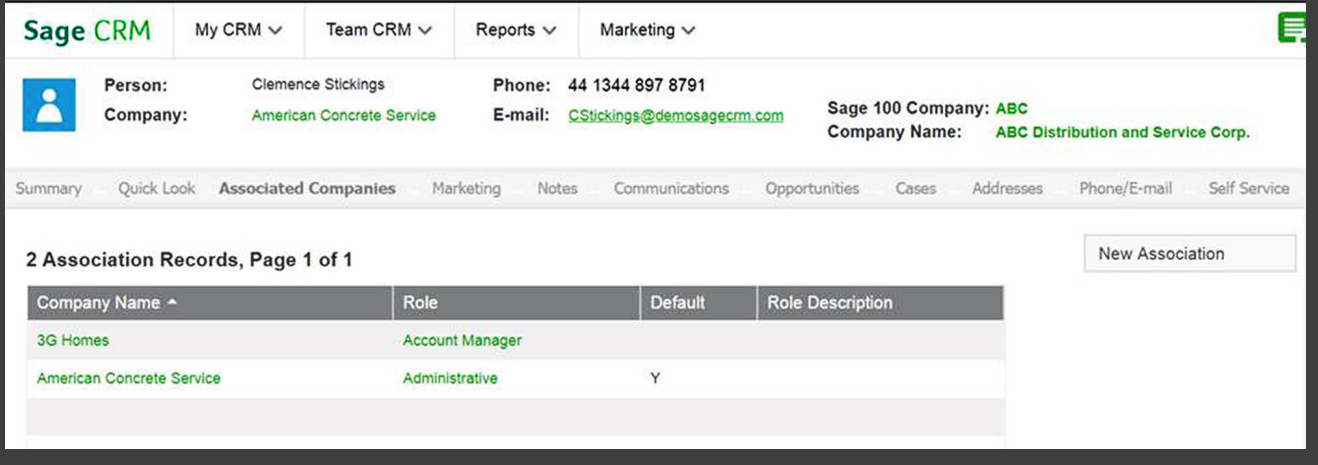


FOCUS ON THE DETAILS

Quickly view header and line item details by clicking on the order number. Includes header information up top, with items, quantities, and prices below.

PERSON MULTI-LINK

TRACK COMPLEX, MULTI-COMPANY BROKER AND AGENT CONTACTS WITH EASE



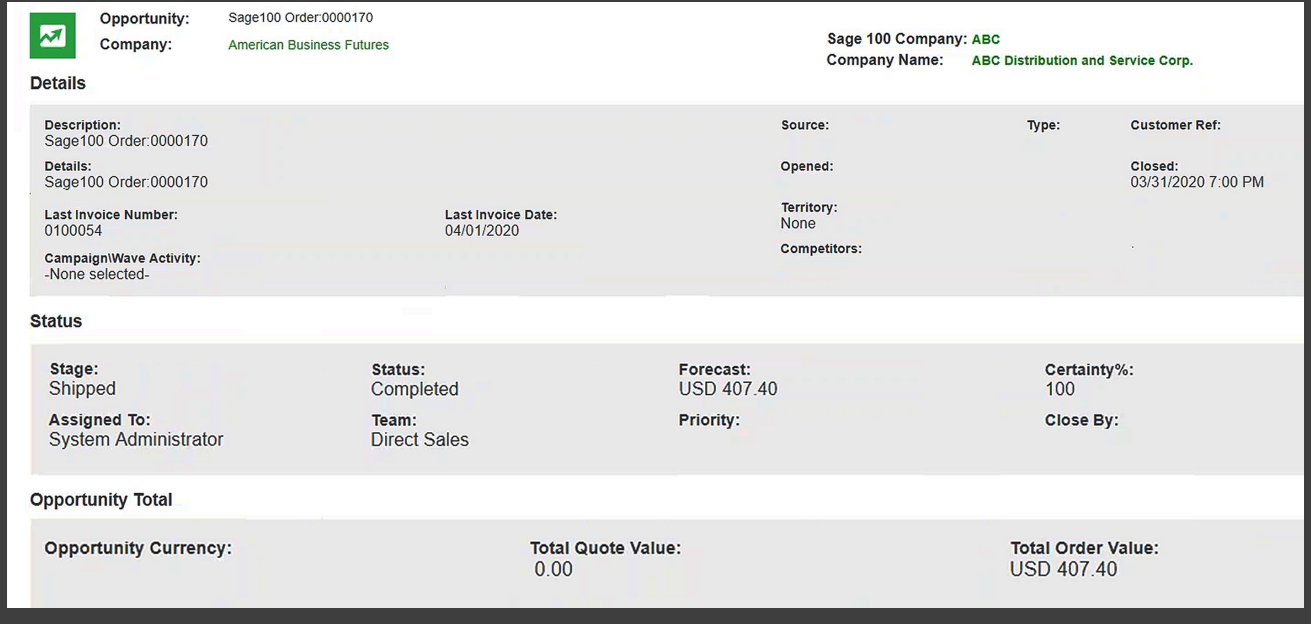
Do you work with an agent, broker, or partner who represents multiple organizations?

The Sage CRM native functionality won't let you link a person to multiple companies. But with the Person Multi Link, you can link each person to every company they represent.

You can track all of your communications against every person and company involved, no matter how complicated those relationships are.

OPPORTUNITY PRO

UPDATE SAGE CRM OPPORTUNITIES WITH SAGE 100 DATA AUTOMATICALLY



With Opportunity Pro, your salespeople always have access to current order statuses right inside Sage CRM based on invoice information from Sage 100.

SAVE TIME

Opportunity Pro reads data in Sage 100 and uses it to update your opportunities in Sage CRM automatically. There's no need to hunt for records, involve other departments, or manually update records in Sage CRM.

SEE THE FULL PICTURE

Keep track of stage, status, certainty percentage, forecast total, and total order value as your order progresses. Use your invoices to create reports and dashboards inside Sage CRM.

HOW TO ORDER

Our add-ons are available either a la carte for $15 per user per month, or

FREE as part of a premium/preferred OnTrack subscription.

If you are already a preferred or premium OnTrack subscriber: Call us to activate these add-ons, FREE!

ORDER FROM OUR WEBSITE

Fill out our online form

WWW.AZAMBA.COM/ADD-ONS

ORDER OVER THE PHONE

Speak to an Azamba representative directly

(888) 724-3999

WHAT IS OnTrack?

OnTrack is our subscription-based CRM adoption program designed to help you get more out of your CRM investment

- Unlimited access to existing and future Sage CRM add-ons
- Unlimited on-demand support calls
- In-depth Sage CRM training
- CRM usage guidance and coaching

IMPROVED USER ADOPTION

The OnTrack methodology has a proven success rate and has helped hundreds of companies successfully adopt CRM.

MAXIMIZED ROI

Ongoing coaching and learning opportunities help you optimize marketing and internal communication, improve customer relations, and increase profitability.

MINIMIZED FINANCIAL RISK

OnTrack is a monthly subscription service, so you know what you're paying in advance and can cancel any time.

Contact our team today to learn more about OnTrack

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* Screenshots have been edited
to highlight features.

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